

Department of Employee Trust Funds  
WISCONSIN RETIREMENT SYSTEM ADMINISTRATION MANUAL

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**CHAPTER 0 — PREFACE**

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(ET-8223)**

This Employer Administration Manual is intended to be a reference source to aid your administration of the Wisconsin Retirement System (WRS).

Periodic changes in legislation and/or policy make it necessary to revise the manual. The Department of Employee Trust Funds (ETF) reviews revisions made to the manual in an attempt to ensure that:

- 1) Wisconsin Statutes and amendments are accurately interpreted in the information presented, and
- 2) Suggestions and examples of employers and other users of the manual are incorporated.

We hope that you will consult the Manual as a first-step resource when you encounter WRS-related questions or concerns. Subchapter 005 of this chapter includes a contact sheet for your use in locating individuals by area of specialization at ETF.

In an effort to enhance customer service to employers, we have implemented the **Employer Communication Center** to provide a single point of contact to resolve issues regarding eligibility and enrollment for all ETF benefit programs. Incoming calls are routed to staff members within the Bureau of Employer Administration. A central voice-mail system handles calls if all Employer Communication Center staff lines are busy. The voice-mail system is monitored on a regular basis so calls are returned timely. The **Employer Communication Center** phone number is **(608) 264-7900**.

We appreciate your efforts to accurately administer the provisions of the WRS. If you have comments on this edition or suggestions for the next edition of the Manual, please contact the Division of Employer Services, at (608) 266-8411.

ETF does not discriminate on the basis of disability in the provision of programs, services or employment. If you need this printed material interpreted or in a different form or if you need assistance in using our services, please contact us at (608) 266-0728 or TTY: (608) 267-0676.

**001 Programs Administered**

Section 218 Agreements with the Social Security Administration

Wisconsin Retirement System (WRS)

Deferred Compensation (DC)

Group Life Insurance Plans (GI)

- Basic Life Insurance
- Supplemental Life Insurance
- Additional Life Insurance
- Over Age 70 Additional Life Insurance
- Spouse and Dependent Life Insurance

Income Continuation Insurance (ICI)

Group Health Insurance

Employee Reimbursement Account (ERA) Program (State Agencies Only)

Long-Term Disability Insurance Benefit (LTDI)

**002 Administrative Offices**

**Madison Office:** Department of Employee Trust Funds  
801 W. Badger Road  
Madison, WI 53702

Telephone: See Staff Contacts in Subchapter 005 of this Chapter

TTY: (608) 267-0676  
FAX: (608) 266-5801

**Madison Mailing Address:** PO Box 7931  
Madison, WI 53707-7931

**Milwaukee Office:** Milwaukee State Office Building  
819 North Sixth Street, Room 550  
Milwaukee, WI 53203

Telephone: (414) 227-4294

**Office Hours:** 7:45 a.m. to 4:30 p.m. - Monday through Friday (except holidays)

### 003 Ordering ETF Forms

To order forms and brochures from ETF, please use our voice mail request line in Supply and Mail Services, (608) 266-3302. The voice mail program allows you to call and order forms and brochures by leaving a recorded message. The message you hear will prompt you to provide the following:

- The four-digit form number beginning with the letters ET-, for example, ET-2316.
- The name of the form.
- The quantity desired.
- Your employer name.
- Your seven-digit employer identification number starting with 69-036-

The message also will state the amount of time to allow for your order to be filled.

#### A. Checking on the Status of an Order

Our response time depends on the number of requests received, staffing levels and other workload demands. If you do not receive an order within three weeks, please call the request line to check the order's status. State the following:

- The date the order first was placed.
- Your employer name, your name and telephone number.

Your call will be returned as soon as possible to let you know the status of your order.

#### B. Receiving Partially Filled Orders

It is sometimes necessary to partially fill orders because forms may be temporarily in short supply. When this occurs, you may receive fewer copies than those requested. A notice will be included with your partial order. You do not need to resubmit the request; the balance of your order is retained and filled when the forms become available.

Should you have an urgent need to place an order, call the Employer Communication Center at (608) 264-7900.

### 004 Internet Address

ETF has designated a Website and it contains information on various benefit topics related to active employees, retirees and employers. The address is:

<http://badger.state.wi.us/agencies/etf>

The site contains numerous forms and brochures, maps to our Madison and Milwaukee offices, e-mail for inquiries, employer bulletins and a WRS formula benefit calculator. The site provides links to related sites, some of which are: the State of Wisconsin Investment Board (SWIB), Social Security Administration (SSA) and Internal Revenue Service (IRS).

**005    *Department of Employee Trust Funds Contact List (ET-8223)***

The following contact list provides the names and telephone numbers of ETF staff by area of specialization.

# DEPARTMENT OF EMPLOYE TRUST FUNDS CONTACT LIST

	WISCONSIN RETIREMENT SYSTEM	ERA	GROUP INSURANCE		INCOME CONTINUATION
			HEALTH	LIFE	
Additional Deposits	608-266-0728 Dale Ferron				
Appeals	608-267-2417 Sharon Walk	608-266-2640 Marcia Blumer	608-266-0211 Bill Kox	608-266-2640 Marcia Blumer	608-266-3099 Steve Grob
Back Pay Awards/Reinstatements	608-264-7900 Employer Comm. Center				
Benefit Information Presentations	608-266-3463 Luana Schneider				
Benefit Questions	608-266-3285 or 414-227-4294 Member Services	800-342-8017 FBMC Mgmt.		608-266-3285 or 414-227-4294 Member Services	608-266-3285 or 414-227-4294 Member Services
Boards, Board Members, Meeting Dates	608-267-2862 Debbi Tupper				
Completion of Benefit Applications	608-266-3285 or 414-227-4294 Member Services	800-342-8017 FBMC Mgmt.			608-266-5405 UWIC Lavonne Summers
Completion of Enrollment Applications	608-264-7900 Employer Comm. Center		608-264-7900 Employer Comm. Center	608-264-7900 Employer Comm. Center	608-264-7900 Employer Comm. Center
Completion of Remittance Reports	608-266-2737 Ron Diehl	608-266-0781 Tom Machaj	608-266-2737 Ron Diehl	608-264-6637 Marty Morin	608-264-6637 Marty Morin
Contract Interpretation		608-266-2640 Marcia Blumer	608-266-6465 Phyllis Fuller 608-264-6624 Beth Ritchie	608-266-2640 Marcia Blumer	608-266-3099 Steve Grob
Determination of Employer Rates	608-266-0904 Bob Willett	608-266-2640 Marcia Blumer	608-266-0212 Cathy Duster 608-266-0211 Bill Kox (backup)	608-266-2640 Marcia Blumer	608-266-2099 Steve Grob
Determination of WRS Service/Earnings	608-264-7900 Employer Comm. Center	Not Applicable	Not Applicable	Not Applicable	Not Applicable
Electronic Reporting	608-266-0728 Dale Ferron				
Eligibility Inquiries From Employers (participants should contact their payroll and benefits office)	608-264-7900 Employer Comm. Center	800-342-8017 FBMC Mgmt.	608-264-7900 Employer Comm. Center	608-264-7900 Employer Comm. Center	608-264-7900 Employer Comm. Center
Employer Training	608-266-0133 Employer Educ. Mngr.	608-266-0133 Employer Educ. Mngr.	608-266-0133 Employer Educ. Mngr.	608-266-0133 Employer Educ. Mngr.	608-266-0133 Employer Educ. Mngr.
How to Complete Employee Transaction Reports/Annual Reporting	608-264-7900 Employer Comm. Center		Not Applicable	Not Applicable	Not Applicable
Investment of the Trust Funds (financial condition of the trust funds)	608-266-0904 Bob Willett				

	WISCONSIN RETIREMENT SYSTEM	ERA	GROUP INSURANCE		INCOME CONTINUATION
			HEALTH	LIFE	
Local – Health, ICI Program (Policy Only – all other questions go to the Employer Communication Center at 608-264-7900)			608-266-6465 Phyllis Fuller		608-266-3099 Steve Grob
Marketing questions related to other types of insurances (auto, home, etc.)			608-266-6465 Phyllis Fuller		
New Employer Coverage	608-267-2198 Rick Parpart	608-266-2640 Marcia Blumer	608-267-2198 Rick Parpart	608-267-2198 Rick Parpart	608-267-2198 Rick Parpart
Ordering Supplies or Forms	608-266-3302 Supply & Mail Services		608-266-3302 Supply & Mail Services	608-266-3302 Supply & Mail Services	608-266-3302 Supply & Mail Services
Previous Service Checks for Eligibility by Employers	608-264-7900 Employer Comm. Center		608-264-7900 Employer Comm. Center	608-264-7900 Employer Comm. Center	608-264-7900 Employer Comm. Center
Social Security (W-2 covered earnings, Medicare, FICA taxes)	608-266-0728 Dale Ferron				
State of Wisconsin Deferred Compensation Program	608-266-2798 Mary Willett				
Status of Legislation Affecting Benefit Plans	608-267-2929 Pam Henning 608-261-8164 Linda Owen	608-266-2640 Marcia Blumer 608-267-2929 Pam Henning	608-266-0211 Bill Kox 608-267-2929 Pam Henning	608-267-2929 Pam Henning 608-266-2640 Marcia Blumer	608-261-8173 Audrey Koehn 608-267-2929 Pam Henning
Survey Questions	608-261-8164 Linda Owen		608-266-0211 Bill Kox	608-266-2640 Marcia Blumer	608-261-8173 Audrey Koehn
"What's In It For You" Video	608-267-0388 Andrea Williams				
1099-R Tax Forms	608-264-6630 Janet Nelson 608-266-2334 Lisa Allen				

If an employee has a question about his/her individual account or about benefits from programs administered by the Department; or if you have questions concerning the death of an employee, a Trust Fund Specialist can be reached 7:45 a.m. - 4:30 p.m., Mon.-Fri. at one of the following Member Services numbers:

	Madison: (608) 266-3285 TTY: (608) 267-0676	Milwaukee: (414) 227-4294
Location of Offices:	Madison: 801 West Badger Road Madison WI 53702	Milwaukee: 819 North Sixth Street, Room 550 Milwaukee WI 53203
Mailing Address:	P O Box 7931 Madison WI 53707-7931	